

Fundraising Bright Spots Learning Community



Session One: Getting Grounded in Fundraising Bright Spots

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Welcome to The Fundraising Academy Bright Spots for Black and Brown Communities program!

We are looking forward to beginning this journey of team-based organizational sustainability with your learning pair and your organization. Now more than ever, we are excited to come together and create new fund development actions that move our organizations past 'best practices' to genuine and effective actions.

We will support this learning community to build upon the Bright Spots examples to spark creativity and to re-claim community wisdom about giving to others and building power together.

In the months ahead, we hope you begin to see **Fundraising Academy Bright Spots** program as a home for you and the important work you are doing, one that respects, sustains, and nourishes you. We anticipate that the program will be creative, challenging, and fulfilling, and that you will walk away with relationships that become a "peer lifeline" for many years to come.

We are eager to get this group of amazing individuals together and can't wait to meet all of you in person. It is our hope that each of you get much needed support and rejuvenation over our time together and that you arrive at our first in-person gathering, ready to build!

Warmly,

Your Bright Spots Program Team
Belinda, Steve and Spring

Relationships

To build trust, break down silos, and deepen collaboration skills and practices.

Resources

To develop tools and new ways of thinking about generating, navigating, and managing resources for sustainability

Resilience

To share practices for self-care and rejuvenation.
To name, address, and heal from the impact of racism, sexism, classism, and other forms of oppression

Notes

For Our Community Abundance Altar

What object did you bring for the abundance altar and what's important in its meaning, spirit for you?

How do you wish to carry this meaning and spirit of abundance through our learnings, sharing and actions?



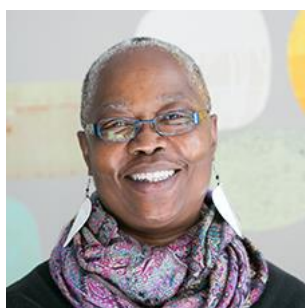
ABOUT THE BRIGHT SPOTS PROGRAM TEAM



Steve Lew is a senior project director at CompassPoint. He helps positional and emerging leaders increase their effectiveness in fundraising, governance, leadership, strategy, and multicultural group development. Steve was CompassPoint's development director and a senior manager for several years, and previously served as executive director and development director in HIV and cultural arts nonprofits in San Francisco. Steve's work at CompassPoint has been deeply connected to building the strength of organizations, leaders, and networks in communities of color. He has co-designed and led the Fundraising Academy for Communities of Color and the Next Generation Leaders of Color Program and has been a fundraising and leadership coach for many of these participants for over a decade. He deeply appreciates nonprofit leaders who are on a path to align their personal values, practices, and impact more closely to the change they are working toward in their organizations. Contact Steve: SteveL@compasspoint.org



Belinda Madrid Teitel taps into a range of experience in service to CNM clients. As an executive coach, capacity building consultant, and trainer, Belinda has experience in fundraising, effective boards, leadership, organizational development, and strategic planning. Over the past 15 years, Belinda has worked with hundreds of organizations of all types and sizes. Prior to her consulting work, she served as Regional Director for Earth Share California, a nonprofit federation of 90 premier environmental organizations. Belinda launched her career in banking and finance and has extensive ties with the nonprofit and business sectors. She is a certified Governance Trainer for BoardSource, a Professional Certified Coach with the International Coach Federation, and she serves on the boards of the Greater Los Angeles Chapter of Association of Fundraising Professionals, and Girls on the Run, Los Angeles. Contact Belinda: bmteitel@cnmsocal.org



Spring Opara is an associate project director for CompassPoint. She is responsible for creatively providing project management support by designing systems and protocols to manage the implementation and execution of Cohort Leadership Programs (CLP) and consulting contracts. Spring has worked for several nonprofits in the Bay Area including WestEd, The Toigo Foundation, The Dental Health Foundation, and The Link to Children (TLC), all of which have allowed her to develop a plethora of skills and opportunities to support work that has a positive impact in her community. Spring served five years in the U.S. Air Force, where she received numerous medals. She was honorably discharged in 1984 with the rank of E/5, SSgt. Spring is a published writer of both fictional short stories and poems. She was the Women's Initiative Simple Steps to Success 2010 valedictorian and, in her spare time, works to empower women by facilitating workshops on how to grow your own business. Contact Spring: springo@compasspoint.org

Fundraising Bright Spots Program – Los Angeles 2017/2018 Participants List

Al Wooten Jr. Heritage Center

9106 S. Western Ave.
Los Angeles, CA 90047

<https://www.wootencenter.org>

Budget Size: \$485K

Naomi McSwain, Executive Director

nmcswain@wootencenter.org

Program Advisor: Aurea Montes-Rodriguez

Community Coalition

8101 S. Vermont Ave.
Los Angeles, CA 90044

<http://cocosouthla.org>

Budget Size: \$5M

Anthony Foster, Coordinator of Special Projects

anthony@cocosouthla.org

Gerri Lawrence, Grant Writer

gerri@cocosouthla.org

Program Advisor: Belinda Madrid Teitel

Black Women for Wellness

4340 11th Ave.
Los Angeles, CA 90008

<http://www.bwwla.org>

Budget Size: \$880K

Janette Robinson-Flint, Executive Director

janette@bwwla.com

Willie Duncan, Sr. Program Manager

willie@bwwla.com

Program Advisor: Leslie Cooper-Johnson

Dolores Huerta Foundation

PO Box 2087
Bakersfield, CA 93303

<http://doloreshuerta.org>

Budget Size: \$2M

Juanita Chavez, Communications & Media Coordinator

jchavez@doloreshuerta.org

Martha Leon, Public Relations Associate

mleon@doloreshuerta.org

Program Advisor: Angela Johnson-Peters

Californians for a Better Environment

6325 Pacific Blvd., Ste. 300
Los Angeles, CA 90255

<http://www.cbecal.org>

Budget Size: \$2.3M

Dinah Dominguez, Grassroots Fundraising Organizer

dinah@cbecal.org

Sylvia Arrendondo, Civic Engagement Coordinator

sylvia@cbecal.org

Program Advisor: Angela Johnson-Peters

East LA Community Corporation

2917 East 1st Street, Ste. 101
Los Angeles, Ca 90033

<http://www.elacc.org>

Budget Size: \$3M

Elizabeth Lugo, Director of Fund Development

elugo@elacc.org

Isela Gracian, President

igracian@elacc.org

Program Advisor: Angela Johnson-Peters

East Yard Communities for Environmental Justice

2317 S. Atlantic Blvd.
Commerce, CA 90033

<http://eycej.org>

Budget Size: \$568K

Negrete Hector-Alessandro, Development & Communication Coordinator

alessandro.negrete@gmail.com

Maria Becerra, Administrative Assistant

mariabecerra3@gmail.com

Program Advisor: Aurea Montes-Rodriguez

Inquilinos Unidos

1930 Wilshire Blvd., Ste 801
Los Angeles, CA 90057

<http://www.inquilinosunidos.org>

Budget Size: \$311K

Luis R Cabrales, Executive Director

lcabrales@inquilinosunidos.org

Faviola Pablo

fpablo@inquilinosunidos.org

Program Advisor: Aurea Montes-Rodriguez

Las Fotos Project

1000 N. Alameda Street, Ste. 240
Los Angeles, CA 90012

<http://lasfotosproject.org>

Budget Size: \$310K

Eric Ibarra, Executive Director

eric@lasfotosproject.org

Program Advisor: Steve Lew

CompassPoint Advisor Contact:

Steve Lew, SteveL@compasspoint.org

National Day Laborer Organizing Network

674 S. La Fayette Park Place
Los Angeles, CA 90057

<http://www.ndlon.org/en>

Budget Size: \$2M

John Arvizu, Director of Finance & Development

jarvizu@ndlon.org

Michelle Gallarza

michelle@ndlon.org

Program Advisor: Leslie Cooper-Johnson

Social Justice Learning Institute

600 Centinela Ave.
Inglewood, CA 90302

<http://www.sjli.org>

Budget Size: \$1M

Linda Reyes, Development & Communications Manager

lreyes@sjli.org

Tyler Vernon, Resource Development Coordinator

tvernon@sjli.org

Program Advisor: Steve Lew

UFW Foundation

3002 Whittier Blvd.
Los Angeles, CA 90023

<http://www.ufwfoundation.org>

Budget Size: \$3M

Ester Cadavid, Director of Development

ecadavid@ufwfoundation.org

Vanessa Cota, Grant & Fiscal Compliance Director

vcota@ufwfoundation.org

Program Advisor: Belinda Madrid Teitel

Fundraising Bright Spots Los Angeles

KICK-OFF Gathering

July 12, 2017

9:00 am to 4:30 pm

Community Partners
1000 North Alameda Street
Los Angeles, CA 90012
213.346.3212

SAVE THE DATES – ACTION REQUIRED!

If you have not done this, please take a moment to mark your calendars for the next four sessions. If you have questions, please contact Spring Opara, at 510.318.3738 or email at springo@compasspoint.org, and she will get back to you as soon as possible.

Session Dates

*Note all sessions will be held at the **Community Partners** location

Session #2: August 16, 2017	Session #3: September 14, 2017
Session #4: November 8, 2017	Session #5: January 11, 2018

Purpose

The Fundraising Academy for Communities of Color purpose came out of a recognition that fundraising and philanthropy replicates the same inequities that exist in larger systems of oppression unless we work in an intentional way to change it.

The Bright Spots for Black and Brown communities' purpose is to be a place of learning & support for participants to create more sustainable ways to generate resources among Black and Brown led organizations.

ABOUT THE PROGRAM

The Fundraising Bright Spots Program: Making Fundraising Work for You

This 8 month long intensive, will support your organization's **exploration, development, and implementation of a shared leadership approach to fundraising** that aligns to and builds on your organizational values, strengths, and identity. Research from our latest report, *Fundraising Bright Spots*, shines a light on how organizations that run successful individual donor programs thrive by taking on fundraising in a way that is:

- Core to the **organization's identity**
- **Distributed broadly** across staff, board and volunteers
- Based on **authentic relationships** with donors
- Characterized by **persistence, discipline, and intentionality**

But how can these values play out for your organization when it comes to developing your own fundraising strategy? In this program, we'll help you activate practices from successful grassroots fundraising models and individual donor programs highlighted in the *Fundraising Bright Spots* report. You'll get the **content, expert guidance, and support** you need to spark deep shifts in how you think about fundraising, and ignite a new **plan of action** that can sustain your organization's social justice agenda now and for years to come.

HOMework

Between each seminar, your team will have homework to continue analysis and development of your plan; guide you in bringing program content and learning back to staff and board; and vet proposed decisions with others within your organization to get feedback, increase ownership, and foster alignment.

COACHING & PROGRAM ADVICE

Your coach is a resource for how you utilize the program and create changes in your work and the organization. One of the biggest missed opportunities is when people leave a session with lots of ideas, yet cannot find the time, support or resources to enact them. Having a thirty to sixty minute call with your coach in between group sessions is a way for your team to stay connected to the Bright Spots program learning and the actions you and your partner hold important.

Coaches are:

Angela Johnson Peters: <https://www.linkedin.com/in/angelajohnsonpeters/>

Aurea Montes-Rodriguez: <http://cocosouthla.org/aurea/>

Leslie Cooper Johnson: <http://cocosouthla.org/lesliejohnson/>

Steve Lew & Belinda Madrid Teitel

OVERALL PROGRAM OBJECTIVES

Skills/Knowledge:

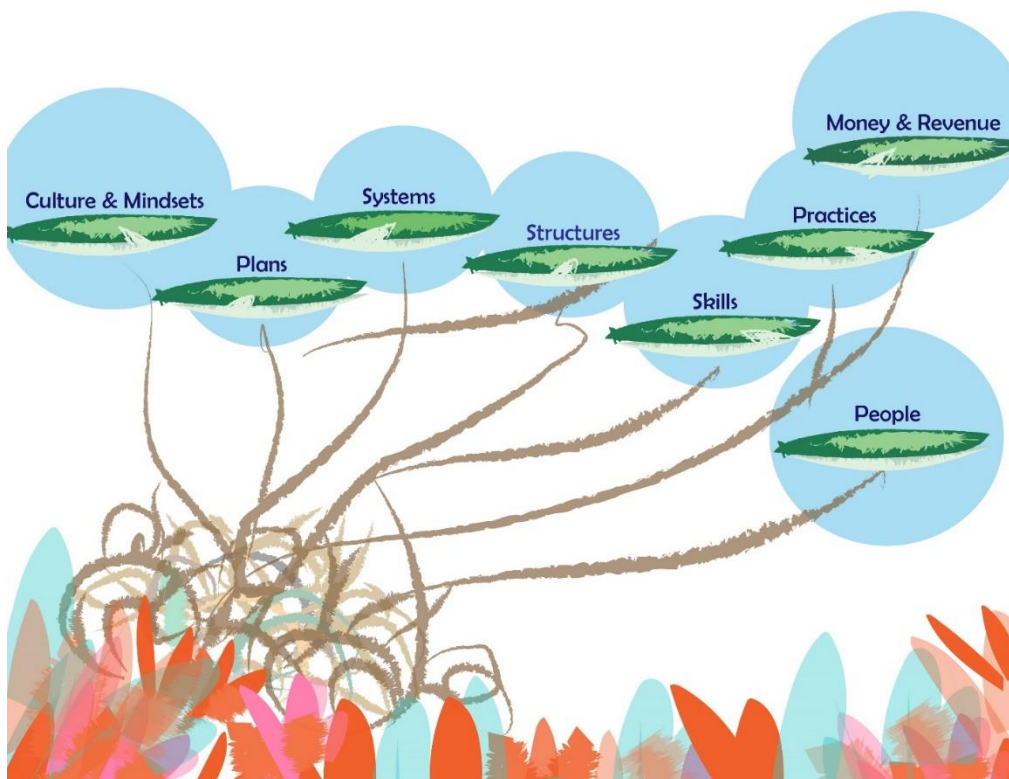
- Clarify your organizational business model, identifying and creating shared understanding of your “primary and secondary” income strategies
- Achieve greater clarity around which fundraising strategies you are pursuing and why
- Make meaning of donor data to guide your fundraising

Systems:

- Improve or implement fundraising systems by working to:
 - Clarify data collection strategies
 - Institute practices and habits that will contribute to better understanding of organizational fundraising data
 - Integrate development principles grounded in current field knowledge
 - Create a documented plan to distribute fundraising activities throughout the organization
 - Clarify each person's role

Culture:

- Identify how fundraising lives both inside and outside the organization
- Understand how fundraising can build power in your community, movement, and in the organization
- Be able to name organizational culture shifts required to support your plan



COMMUNICATION AGREEMENTS

- ✓ **Confidentiality** is often defined as “what’s said in the room stays in the room” and we agree not to discuss what happens here in a way that would identify any individual or organization. There is another dimension to confidentiality that includes “asking permission” to share or discuss any statement another person makes of a personal nature. It helps to remember that the story belongs to the teller, not the listener.
- ✓ **Move-up Participation.** Honor different beliefs and encourage empowerment by making a space for all voices, experiences and ideas to be heard and shared. Talking does not equal participation. Generous listening is a form of participating. If you speak a lot, try listening more. And if you tend to sit back and listen, consider speaking up more.
- ✓ **Intent is different than impact,** and both are important. It is also important to own our ability to have a negative impact in another person’s life despite our best intention. In generous listening, if we assume positive intent rather than judging or blaming, we can respond, rather than reacting or attacking when a negative impact occurs.
- ✓ **It’s okay to disagree.** Avoid attacking, discounting or judging the beliefs and views of yourself or others – verbally or non-verbally. Instead, welcome disagreements as an opportunity to expand your world. Ask questions to understand other people’s perspectives.

LEARNING AGREEMENTS

- ✓ **Embrace polarities.** Avoid binaries and embrace wicked questions (i.e. paradoxical truths), such as “How can we be both BOLD and humble in our asking?”
- ✓ **Real play, not role play.** Let’s try on ways of being, and ways of doing here in this room.
- ✓ **Name elephants.** Be intentional about speaking the unspeakable; foster a culture of candor inside and outside your organization.
- ✓ **Be open to new ideas and perspectives,** and be open to having your current ideas and perspectives challenged.
- ✓ **Embrace inquiry.** Ask difficult, reflective questions as a matter of course.

“All communities are sites of collective imagination, social processes rather than mere locations for living and work.” Manning Marable

Notes

SESSION ONE
Wednesday, July 12, 2017

9:00 – 9:30	Coffee, Tea, and Breakfast
9:30 – 10:20	Welcome, Introductions & Abundance Altar Building
10:20 – 10:35	Group Agreements
10:35 – 10:50	Break
10:50 – 11:40	Mapping Your Current Fundraising Environment
11:40 – 12:00	Overview of Fundraising Bright Spots Research
12:00 – 12:30	Fundraising Self-Assessment
12:30 – 1:30	Lunch
1:30 – 2:20	Core Organizational Identity
2:20 – 2:35	Right Relationship/Right Revenue
2:35 – 2:50	Break
2:50 – 3:50	Right Relationship/Right Revenue – cont'd
3:50 – 4:00	Energizer Activity
4:00 – 4:15	Next Steps
4:15 – 4:30	Close/Adjourn

SESSION ONE: GETTING GROUNDED & BRIGHT SPOTS PRINCIPLES

Today's objectives:

- ✓ Begin establish a learning community; learning about our individual and collective strengths and talents
- ✓ Create a baseline understanding of how fundraising happens in your organization
- ✓ Understand the fundraising bright spots mindsets in the four theme areas
- ✓ Explore how fundraising is core to your organizational identity
- ✓ Begin to assess alignment of your fundraising activities to your current revenue model

Mapping Your Current Fundraising System

Mapping Exercise

This activity is foundational to the work your team will be doing together over the next six months. Having a clear understanding of the roles you activate for fundraising and development and the people who fulfill those roles is important before planning to make fundraising more widespread. It's as important as your fundraising goals, strategies and, along with a database, the people and roles that comprise the current development system.

Map It Out

Draw a "map" of your current fundraising structure and environment. Do your best to document what is actually happening (versus what is aspirational or planned). As we move through this program together, your map will change as you analyze your system, adapt new ideas, and try things on.

1. Consider all the activities that occur during the year to raise money from individuals and institutions.

Create a list of those actions, organized around these categories: *Identifying prospective supporters; Cultivation of prospective supporters; Asking for new support and renewals; Recognition and Thanks; Stewardship.* List any events within these categories based on the function that the event is serving.

Example: a house party may be "asking for new support or renewals" an open house might be "identifying prospective supporters" a gala event may be "Asking" as well as "Stewardship."

Category	List all activities in the year
Identifying potential supporters "prospects"	
Cultivation	

Category	List all activities in the year
Asking	
Recognition	
Stewardship	

On your own... Each person in pairs creates their own map.

Once you have named most or all of your activities in a year, map out who is doing what.

1. Start with yourself by putting your name in a circle. Since you are coordinating and leading much of this work, put your circle in the middle.
2. Add additional circles for other staff who are also playing more central roles, which require more time and responsibilities in development. Be specific in listing what activities or actions they are expected to do related to the development categories.
3. Create as many circles with people (i.e. the board may actually be many small circles if different members are doing specific and different actions than others. Name each person if you can.
4. Remember to add the donors, volunteers, and clients/constituents, elected officials who have played special roles in any of the activities you listed.
5. Now look at your map. Notice who is named. Now ask yourself if each person actually made an effort in the activity or if they are there in name only ☹️. Cross out those activities that did not happen.
6. Place a positive symbol or a star by the people who are getting most of their activities done. Consider them your "bright spots" in fundraising. Note next to their name: *What did you learn in the last month about how and why they were able to do what they did in fundraising?*

Now map it out further...

1. What supports these bright spots? What 'system tools' are used to fulfill the fundraising functions? Name things like your database, email server, social media platforms, gift recordkeeping, and other processes with a box around each tool. Connect names of the people who maintain the tools by drawing a line to their circle.
2. What Allies and Opinion Makers have helped with your fundraising? (Think advisory council members, elected officials and public agency employees, activists from coalitions who have helped out, etc.)
3. What else would you include that we haven't thought of?

Paired work:

Share your maps with each other-

- What did each of us emphasize differently?
- Who are the people if any that we see as bright spots?
- What areas are we really covering, and what areas are we really missing?
- What else do your maps tell you?

You will come back to this again to envision a future fundraising map- for now take a photo of each of your maps and send them to each other and send a copy to Spring Opara, springo@compasspoint.org for future reference.



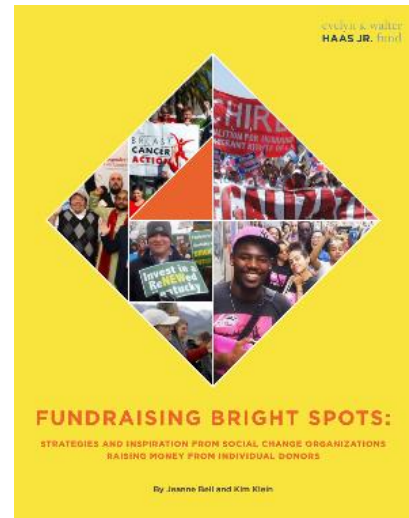
Fundraising Bright Spots: Key Themes

Fundraising is Core to the Organization's Identity

"We don't set goals for [our clients], they set their own goals and we accept and respect them unconditionally. Same with the board and donors. 'What do you want to do? Great, how can we help you?'"

Fundraising is Distributed Broadly Across Staff, Board and Volunteers

"It's not about someone being professional or educated in a certain way. It's really about shedding light on the fact that we already have these skills in communities of color. It's about making visible and lifting up the resourcefulness that we've always had."



Fundraising Succeeds Because of Authentic Relationships with Donors

"I love our donors. I actually love them, I have a personal intimate connection to them when I sit down and write a fundraising letter. I adore them. I think they are extraordinary people."

Fundraising is Characterized by Persistence, Discipline, and Intentionality

"We don't have a singular development plan. We have a system."

Brightness Self-Assessment

First do an individual assessment, then compare with your teammate.

Fundraising is Core to the Organization’s Identity				
Mindsets	Strongly Disagree	Disagree	Agree	Strongly Agree
1. The decision to raise money from individuals—as well as the approaches used to do so—are steeped in existing organizational & community values.	1	2	3	4
2. Being genuine about who we are and what we stand for as an organization is core to fundraising success	1	2	3	4
3. Fundraising is a form of organizing and power-building, not merely a strategy for financing the organization’s work.	1	2	3	4
Fundraising is Distributed Broadly Across Staff, Board and Volunteers				
Mindsets	Strongly Disagree	Disagree	Agree	Strongly Agree
4. Fundraising is not the purview of a select group of professionals, but a process, if well-supported, that anyone can engage in.	1	2	3	4
5. Development directors are organizational leaders focused on skill building, work culture change, and systems development to support others in fundraising.	1	2	3	4
6. The conversation about fundraising goals and progress belongs everywhere. It’s not contained in a single department or confined to a single team.	1	2	3	4
Fundraising Succeeds Because of Authentic Relationships with Donors				
Mindsets	Strongly Disagree	Disagree	Agree	Strongly Agree
7. “Donor” is only one aspect of the many relationships that committed supporters forge with our organization.	1	2	3	4
8. Authentic relationships with donors are part of a larger organizational culture that values relational rather transactional interactions with everyone.	1	2	3	4
9. High trust and accountability among staff and board members allow leaders to weather fundraising’s inevitable ups and downs together.	1	2	3	4

Fundraising is Characterized by Persistence, Discipline, and Intentionality

Mindsets	Strongly Disagree	Disagree	Agree	Strongly Agree
10. More important than having a perfect system is working whatever system we have with a stance of rigor and continuous improvement.	1	2	3	4
11. Development and communications are inextricably linked; compelling communications are a powerful way to acquire, engage, and retain donors.	1	2	3	4
12. The use of data is not just about having a donor database. It's also about surveying our donors; getting feedback from our fundraisers on what messages are resonating; and studying the performance of every fundraising campaign and event.	1	2	3	4

Assessment Notes:

Organizational Identity: What is Core?

A dictionary definition of core names it as the “central, innermost, or most essential part of anything.” In his work, researcher and management consultant Jim Collins discusses an organization’s core ideology in the terms of deepening our understanding of it, not designing or creating it:

“You do not create or set core ideology. You discover core ideology. You do not deduce it by looking at the external environment. You understand it by looking inside. Ideology has to be authentic. You cannot fake it. Discovering core ideology is not an intellectual exercise. Do not ask, “What core values should we hold?” Ask instead, “What core values do we truly and passionately hold?” You should not confuse values that you think the organization ought to have – but does not – with authentic core values. To do so would create cynicism throughout the organization.”¹



Bright Spot Examples of Core Identity

Traditionally, fundraising has been viewed as a supporting activity, an overhead cost, or as a means to a programmatic end. That’s not the case for the Bright Spots. For them, fundraising is part and parcel of organizational identity.

Who they are and what they believe specifically informs how they approach fundraising from individuals. Many of the Bright Spots identify as social justice movement-building organizations. For them, giving money is integral to being part of a movement. They involve their donors and members in fundraising as part of a broad array of engagement strategies such as strategic agenda setting, issue education, and political action.

¹ “Building Your Company’s Vision,” Collins & Porras, Harvard Business Review, 1996.

Fundraising the RISE way: Respect, Inspire, Support, Empower

We RESPECT our donors and their commitments to RISE—their invested time, money, energy, and emotion—because our donors are activists, invaluable to our mission of ending violence and creating peace.

We strive to INSPIRE our donors with meaningful content sharing about RISE, our clients, and the movement to end gender-based violence.

We SUPPORT donors in getting involved in ways that are exciting and meaningful for them, and thank them with authentic appreciation.

We EMPOWER donors to be ambassadors to their communities, bringing our message and mission.

Bright Spots organizations could easily articulate how fundraising from individuals is inspired by and reflective of their organizational values. Their work reminds us that fundraising identity can't be tacked on, hired, or manufactured to meet a budget shortfall; it is embedded in organizational identity...

Unconditional acceptance, self-determination, and individualization

Member engagement is leadership development

Our work is building power and building the base

Think Before You Pink

RISE - Respect. Inspire. Support. Empower

What is Core? EXERCISE in Pairs

1. Think of a time when your groups' fundraising AND message AND program fit together 'just right'. Describe the details to each other.

What were you doing, what were others doing well. What did that strength look like, feel like?



2. What words do you use to describe what is "core" in your organization's identity.

Consider:

- ✓ **What is your organization's unique approach(es) to the work?**
- ✓ **Organizational values and principles?**
- ✓ **Positive attributes of organizational culture?**

3. In teams, write one to three brief phrases that describe your core organizational identity.

Guiding principles, values, and tenets that undergird everything that your organization does and that fundraising should generate from.

Articulating Your Revenue Model

A nonprofit revenue model is a framework for generating revenues that allows the organization to maximize its intended impact while also generating small surpluses that will feed the organization's future efforts. Often, articulating the revenue model provides the leaders of the organization with focus and clarity as they pursue an optimal business model that allows the organization to thrive in achieving its intended impact.



As nonprofits, we have access to several different streams of funding, and while each of those streams offer us different benefits, each also requires us to develop different management structures and relationships. In years past, "revenue diversity" has often been lauded as a critical element of nonprofit financial management and fiscal health. However, as the sector matures, we are understanding more deeply the programmatic and infrastructure implications of different revenue strategies. Research by *The Bridgespan Group*, among others, has demonstrated that many organizations successfully grow through intentional investment in a dominant type of revenue that is aligned with its work and intended impact (and focus efforts on diversifying among several sources). It's good to have one primary income type that is reliable and repeatable and a secondary unrestricted income source. Even having 8% of your income from annual giving can ease cash flow throughout the year—8% is one month of operating expense!

EXAMPLES: REVENUE STREAMS

- Foundation grants restricted
- Foundation grants unrestricted
- Corporate donations/sponsorships
- Tuition income
- Earned income, fees
- Membership income
- Individual contributions (unrestricted)
- Special event income

Sources are within a stream, for example:

Stream → Restricted foundation grants.

Sources within that stream → The California Endowment, Irvine Foundation, Ford Foundation

RIGHT REVENUE

The state of your revenue working in concert with your intended impact and values. Rather than focusing solely on the question of income diversification, the fundamental question is this:

Do you have the right revenue to pursue your intended impact in a financially viable manner that is aligned with your organizational values?

1. Does the current revenue mix reliably produce a modest surplus?
2. Do we have a reliable source of unrestricted support?
3. Are our largest sources of income paying for work that we deem essential to our intended impact?
4. Are we relying on a funding stream that is changing substantially, and is that change beyond our control?
5. Are we relying on a funding stream that is misaligned with our organizational values?

RIGHT RELATIONSHIP

Just as important as the source of income are the people behind that source. As we articulate your funding model, it is equally important to assess the degree to which you are in right relationship with those that support your organization. The question is:

Are the people supporting your organization aligned with your organizational values, identity, and goals?

EXERCISE

1. Who decides? Within your principal source of funding, who are the particular set of people who dictate the flow of funds? What does that mean for the relationships and systems you need to attend to?
2. What are their motivations? Thinking of these people specifically, what do they want to achieve – for themselves and/or their communities – by giving to your organization? How do they think about and assess the value that your organization delivers?
3. What are the power dynamics in the relationships? Thinking of these people specifically, what power dynamics are at play between you and them? Do they responsibly use their power or do they wield their power inappropriately and/or oppressively?

“Donors do *not* give to your organization. They give *through* your organization to achieve their own desires...to fulfill their own aspirations...to live out their own values.”—Simone Joyaux

“I think we should take the best elements of the donor-centric model, and evolve it into the community-centric model. I think donors want to be neither ATMs nor royalty to be catered to. I think that most would like to be equal partners in the work toward creating an awesome community that they are a part of. If the donor-centric model puts donors in the center, the Community-Centric model focuses on the community as the most important element of our work.”
—Vu Le

HOMEWORK

Before Session 2, each team should complete the following homework:

- Debrief this session with your partner, clarify any role, surface any agreements for how you can participate, and bring back ideas and new actions.
- Re-visit your revenue worksheet and determine what action or decision making is needed, if anything.
- Refine your *What Is Core* statement.
- Schedule your first session with your coach.

How are you leaving today?

What will you share with others in your organization?

Notes

